

IT Service Management

ITSM



Enterprise Application Guide v6.x



For assistance with this document please call
the Enterprise Service Desk at 701.328.4470 or 877.328.4470

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About IT Service Management (ITSM)

ITSM is an ITIL-based service management solution developed by FrontRange Solutions. ITSM has several service management modules; (Incident Management, Problem Management, Change Management, Release Management, Inventory Management, etc.) The Enterprise tool at this time has Incident and Change implemented. The product was purchased in 2007 to upgrade from the HEAT Incident Management system, to allow for an "Enterprise" configuration which provides the necessary security functionality.

ITSM is installed on an application server residing at ITD and accessed via a thin client. Allowing the software to be kept up to date without making changes to the users' workstation. The following agencies have one or more people accessing ITSM; Information Technology Dept(ITD), North Dakota Association of Counties(NDACo), Criminal Justice Information System(CJIS), Department of Human Services(DHS), Office of Management & Budget(OMB), North Dakota Employees Retirement System(NDPERS), Job Service North Dakota(JSND) and the Bank of North Dakota(BND).

The "Enterprise Service Desk" encompasses a range of services, including the ability to process incidents, problems, inquiries, changes, and service requests. The Enterprise Service Desk is the single-point-of-contact between the customer and the IT services; with the obligation to keep customers informed of service events, actions, and opportunities that are likely to impact their business.

The Enterprise Service Desk is a function that is critical to the whole concept of IT Service Management, with the Enterprise Service Desk representatives being accountable for all Incidents, monitoring the status and progress and relaying the information to the customer. The goal of the Enterprise Service Desk is to ensure that normal service is restored for the customer within the agreed service levels.

The Enterprise Service Desk supports a variety of customers, including all levels of government, political subdivisions, cities and counties, higher education, K-12, Edu-Tech, public health units, tribal colleges, libraries, emergency services, commercial, private businesses, and the general public.

The Enterprise Service Desk also works with the North Dakota University Systems transferring incident information between the two locations.

To facilitate a 24x7 Enterprise Service Desk, ITD's Operations staff assist during the evening hours while the Enterprise Service Desk staff perform after-hours and on-call responsibilities which are on the weekends and holidays.

Incidents are events that are either caused by or may cause an interruption in the quality of service. Each incident is stored by a unique incident number.

The Enterprise Service Desk and ITD's Operations staff are the only individuals that have access to create incidents manually. Incidents can also be created via automation such as; Self Service, Sitescope, Web Security, etc.



Documentation Guidelines

Everyone using the Incident Management system shall follow the same documentation guidelines. 'Incident as reported by customer', 'Narrative', and 'Resolution sent to customer' fields need to have spelling and grammar correct in order to provide a polished, professional image to the customer.

Avoid typing in ALL CAPS. This sometimes implies yelling and is often seen as offensive. Use appropriate capitalization and punctuation.

Limit abbreviations (unless common).

Check for spelling errors.

Use descriptive responses. Remember, this information is going back to the customer.

Elaborate on the Resolution sent to the customer. Do not use shortcuts such as: "Completed", "Fixed", "Closed", "Called User", "Done", etc. Let the customer know what was fixed, and restate key information you may have told them. It is not necessary to document word for word the steps to resolution. However, include enough information so that someone reading the Incident for the first time could have a reasonable understanding of what occurred.

Keep a positive and concise tone. Write as if you are talking to someone.

Remember your audience. You will need to adjust your style when responding to technical and non-technical customers.

General cycle of an incident

An incident is created when a customer contacts the Enterprise Service Desk with a problem via a phone call, email; or through an automated process setup to pass the information to the Incident Management system via email.

The following is an example based on a customer calling the Enterprise Service Desk.

- a. If the customer is not on file then the Analyst will obtain the necessary information to create the customer's information. If the customer is on file then the Analyst will verify the information on file with the customer.
- b. If the customer is calling for someone else in their office then their information will be stored in the 'Incident as reported by customer' field.
- c. Based on the problem that is being reported, the Analyst will determine the appropriate **Service Name**. These fields are mainly used for searching and/or reporting purposes.
- d. **Impact & Urgency** are selected based on the customers urgency in getting the problem resolved along with the impact on their departments core business.
 - o The **priority** is then auto generated from these selections.
- e. The Analyst will attempt to enter the problem as described from the customer as fully as possible to assist staff in determining what needs to be done.
- f. The '**Closed information sent to customer**' is filled in by technical staff when a resolution has been given to the customer. This is done at the time the incident is being closed.
- g. The **Received By/Modified By/Closed By** information is displayed to show who created the incident, when it was last modified, and who closed the incident.
- h. When an incident is closed the customer will have the opportunity to take a short survey.
- i. The Service Level Objective (**SLO**) **Date/Time** is a calculated date time.
 - o The priority and the Received Date/Time are used in the calculation to show the customer that our objective is to have the problem resolved by that time.
- j. **Override Received Date/Time** is used by On Call staff to override the actual Received Date/Time when entering the incidents they handle outside of normal working hours.
- k. **Override Closed Date/Time** is used by On Call staff to override the Closed Date/Time when closing incidents they handle outside of normal working hours.
- l. The detail screen is generated based on input from the Analyst, there are only a few such screens in the system.
 - o If a detail screen is present, additional specific data is entered by the Analysts.
- m. On the assignment screen the Analyst will assign the incident to an appropriate resolver group.
 - o Some divisions have a 'Tier 2' group which handles all incoming problems to their area for further research, determination to resolution or if it requires escalation to their tier 3, resolver group.
 - o There is no limit on the number of assignments that can occur.
- n. Journals records are added as needed.
 - o There are no requirements for a journal to be created or a creation limit.
 - o The category is used to determine internal or external communication.
- o. When the problem has been resolved:
 - o The last assignment is resolved.
 - o A resolution description is entered.
 - o The incident is closed.

Starting the application and logging in

- Click on the ITSM desktop icon.
- When the Login screen appears, enter your NDGOV username and password.
- Click Login



The image shows the login interface for the IT Service Management application. At the top, there is a header with the text "IT Service Management" and a decorative graphic of interconnected nodes. Below the header is a "Login" section with a light blue background. This section contains a "Provider" dropdown menu set to "Default", a "Username" text field with the placeholder "username", and a "Password" text field with masked characters. To the right of the "Provider" dropdown is an "Advanced" button. Below the "Username" and "Password" fields are "Login" and "Cancel" buttons. At the bottom of the screen is a dark navigation bar with five icons and labels: "Sales, Marketing & Relationship Management", "Customer Service", "Contact Center", "IT Infrastructure Management", and "IT Service Management". The "FrontRange SOLUTIONS" logo is positioned on the right side of this bar.

IT Service Management

Login

Provider: Default Advanced

Username: username

Password: [masked]

Login Cancel

Sales, Marketing & Relationship Management Customer Service Contact Center IT Infrastructure Management IT Service Management

FrontRange SOLUTIONS

Navigating Service Management

- About the Application window
 - Menu bar – used to access operations
 - Toolbars – used to provide shortcuts to commonly used operations
 - Navigator – used to initiate frequently used actions (such as the Search Center)
 - The Dashboard is the main window upon login. It is a customized screen with three gauges on top, with a multi-view grid below with a variety of options.
 - You can dock it on the left side of the workspace, let it float in a convenient location, or close it completely.
 - Workspace - used to display information about the Incident
 - Identifies the active modules you have access to.
 - Same as navigator, you can auto-hide and/or close it completely.
 - Note: system developed with the resolution of 1152 x 864

Application Window

The screenshot displays the IT Service Management application window. At the top is a **Menu Bar** with options: File, Edit, View, Incident, QuickActions, Searching, Reports, E-mail, Tools, Help. Below the menu bar is a **Toolbars** section with various icons. The main window is divided into a **Navigator** on the left and a **Workspace** on the right.

Navigator: Contains a tree view with 'Incident' selected. Other options include 'New Incident', 'Find Incident...', 'Go To Incident...', 'Incident Quick Close', 'Link Incident to a Change...', 'Link Incident to a Problem...', 'QuickActions', 'QuickAction Center', 'Searches', 'Search Center', 'Global', 'Dashboard Center...', 'Launch E-mail', and 'Launch Calendar...'.

Workspace: Displays the 'Incident' form for Incident 100009. The form includes the following fields and sections:

- Incident:** 100009, **Priority:** High, **SLO:** 4/8/2008 9:56 AM, **Status:** Active
- Last, First Name:** Landis, Kurt
- Name:** Kurt Landis
- Department:** Tax Commissioner, Office of the
- Division:**
- Location:**
- City/State:** Bismarck, ND
- Phone:** (701) 328-4576
- Email:** klandis@nd.gov
- Urgency:** Quick Fix, **Source:** Phone
- Impact:** Quick Fix, **Type:** Incident
- Created by:** shoese, **On:** 4/8/2008 9:40 AM
- Last Mod by:** shoese, **On:** 4/8/2008 9:42 AM
- Closed by:**
- Service Name:** Line-of-Business Services, **Config Item:**
- Detail Screen?**
- Closed information sent to customer:**
- Underlying Cause:**
- Why was the SLO missed?**
- Override Created DateTime:** 4/8/2008 9:40 AM
- Override Closed DateTime:**
- Major Incident?** ☐

Incident Home Page

Dashboard Center

- The top three gauges explain the following:
 - My Team's Unacknowledged Assignments: The number of open incidents where an assignment to your team, yourself or anyone on your team is not acknowledged.
 - My Team's SLO Missed With Communication: The number of open incidents where an assignment to your team, yourself or anyone on your team; did have customer communication within the stated time for that priority.
 - My Team's SLO Missed Without Communication: The number of open incidents where an assignment to your team, yourself or anyone on your team; did not have customer communication within the stated time for that priority.
 - The gauges refresh every two minutes.
- The lower two thirds of the Home Page are used to show different grid information based on your selection in the drop down.
 - The grid automatically refreshes every two minutes.

IT Service Management - Incident Home Page Dashboard

FrontRange IT Service Management Connection : ITSM Welcome Admin

Incident

Incident Home Page

My Team's Unacknowledged Assignments My Team's SLO Missed With Communication My Team's SLO Missed Without Communication

Incidents

Show: My open assignments

Incident #	Customer	Phone	Department	Incident	Urgency	Priority	Created Date	SLO Date
200030	Gerald Olson	7013282922	Information Technology De	test	Low	5	1/8/2009 1:34 PM	1/15/2009
143430	Gerald Olson	7013282922	Information Technology De	test	Low	5	12/30/2008 8:24 PM	12/30/2008
143405	Gerald Olson	7013282922	Information Technology De	test	Low	5	12/22/2008 9:26 PM	12/22/2008
142557	Amy Lorge	7013287512	Human Services, Dept. of	Users are hung up in faces, everyone see	High	2	12/15/2008 4:26 PM	12/15/2008



Incident Record

- a. **Incident:** unique sequential incident number assigned by the system
- b. **Priority:** 1 thru 6 each with a unique color:
 - 1=red, 2=orange, 3=green, 4=blue, 5=medium green, 6=dark green
 - The priority value is derived from the calculation of Urgency and Impact. Please refer to Appendix A for the priority matrix.
- c. **SLO: (Service Level Objective)** the date/time that we have given the customer as to when they can expect to have their problem resolved. This date/time is calculated from the date/time that the incident was created and using the following rules:
 - Priority 1 is 2 hours 24x7
 - Priority 2 is 4 hours 24x7
 - Priority 3 is 9 working hours
 - Priority 4 is 27 working hours
 - Priority 5 is 45 working hours
 - Priority 6 is 15 minutes 24x7
- d. **Lead Call:** shown in red and designating this incident as the lead call over other similar reported calls that have been linked to this one.
- e. **Linked Call:** shown in yellow when the incident has been designated as part of a larger problem, and it shows the Lead Call incident number.
- f. **Status:** four types of incident; Logged, Active, Resolved & Closed.
 - Logged - the incident is active but has not yet been assigned to a team
 - Active - the incident has been assigned to a team
 - Resolved - the incident has been assigned to a team but was put into a Resolved state by staff
 - Closed - the incident has been closed
- g. **First Last Name** - the customers full name as we have them on file
 - The three icons to the right allow for:
 - Searching for a customer
 - Bringing up that customers profile record
 - Creating a new customer profile
- h. **Customer Information:**
 - Full customer name
 - Department name and number
 - Division
 - Location
 - City/State
 - Phone number
 - Email Address
- i. **VIP** - if marked as VIP, the word 'VIP' is shown in red beneath the name.
- j. **Incident as reported by customer** – Description of the incident as reported by the customer.
- k. **Urgency** – Customer's tolerance for delay. High, Medium, Low, and Quick Fix
- l. **Impact** – A measure of the effect of an incident on Business Processes. High, Medium, Low, and Quick Fix
- m. **Source** - Where the incident originated from.
- n. **Created by:** - Who created the incident and date/time
- o. **Last Mod by:** - Who last modified the incident and date/time
- p. **Closed by:** - Who closed the incident and date/time

Assignments Tab

Click this tab to show all the assignment records for the incident.

- Multiple assignments can be 'open' at any time.
- # = number of assignments
- Definition of ownership of an incident.
 - (Non closed Incident) the team/individual of the oldest open assignment.
 - (Closed Incident) the team/individual of the last completed assignment.
- Team = assignment teams within ITSM, prefixed by their agency ID.
- Member = individual within the assignment team.
- Status = Assigned - assigned to a team or member but not yet acknowledged
 Accepted - acknowledged by the team or a member
 Completed - completed by the team or a member

IT Service Management - Incident: 141075

File Edit View Incident QuickActions Searching Reports E-mail Tools Help

Incident 14 of 194

Workspace

FrontRange IT Service Management Connection : ITSM Welcome Admin

Incident

Incident

Navigator

- Global
- Home
- QuickAction Center
- Search Center
- Report Center
- Dashboard Center

QuickActions

- Create3282000Transfer
- SendPasswordLink
- SendSelfServiceEmail
- SendVerificationLink

Searches

Search: Notification, Subject

Reports

Dashboards

Incident

- Go To Incident...
- Find Incident...
- Incident Quick Close
- Link Incident to a Problem...
- Link Incident to a Change...

Change Board

Object Browser

Incident: 141075 Priority: 3 SLO: 12/9/2008 8:56 AM Status: Active

First Last Name: Carla Alber

Name: Carla Alber

Department: Transportation, Dept. of

Division:

Location:

City/State: Bismarck, ND

Phone: (701) 328-2908

Email: dothelp@nd.gov

Ext:

Incident as reported by customer

The Motor Vehicle Dept has a batch that is sitting out in Teleform Verifier # 154705 that is sitting in the "queued" status. Contact is Kari Krein at 328 1978

Customers Telephone: 701-328-2908-

Urgency: Medium Source: Internet

Impact: Medium Type: Incident

Created by: Admin On: 12/8/2008 8:55 AM

Last Mod by: sfroelich On: 12/8/2008 9:32 AM

Closed by:

On:

Assignments: 4 Journals: 0 Close Close Pending Details: 0 Attachments: 0 # of Linked Incidents: 0 Audit Records: 2 Additional Email Address

New Internal Assignment

Created On	Team	Member	Status
12/8/2008 9:02 AM	ITD-Computer Systems Tier 2		Completed
12/8/2008 9:06 AM	ITD-Distributed Systems		Completed
12/8/2008 9:19 AM	ITD-Distributed Systems	Nathan Blowers	Completed
12/8/2008 9:32 AM	ITD-Distributed Systems	Shawn Froelich	Accepted

Start IT Service Management - ... Desktop 11:43 AM

Journals Tab

Click this tab to show all the Journal records created for the incident.

- # = number of assignments
- Category = Customer Communication – narrative is emailed to the customer.
- Category = Internal Communication - narrative is not emailed.
- Narrative – Journal note.
- Created By/On - Who created the journal and when.
- If the incidents is a 'Lead Call' and it is Customer Communication, then the email will be sent to all of the customers that are 'Linked'.

The screenshot displays the IT Service Management interface for Incident 141032. The interface includes a top menu bar with options like File, Edit, View, Incident, QuickActions, Searching, Reports, E-mail, Tools, and Help. Below the menu is a toolbar with various icons for actions like adding, deleting, and searching. The main workspace is divided into several sections:

- Incident Header:** Shows Incident: 141032, Priority: 3, SLO: 12/8/2008 5:00 PM, and Status: Active.
- Customer Information:**
 - Name:** Becky Whitted
 - Department:** Sawyer Public School
 - Division:**
 - Location:**
 - City/State:** Sawyer, ND
 - Phone:** (701) 624-5167
 - Ext:**
 - Email:** becky.whitted@sedit.nodak.edu
- Incident as reported by customer:** Sawyer Public School has no Internet connectivity this morning. I conference Colleen with Becky.
- Urgency:** Medium, **Impact:** Medium, **Source:** Phone, **Type:** Incident
- Timeline:**
 - Created by: dvalz On: 12/8/2008 7:38 AM
 - Last Mod by: cpfau On: 12/8/2008 7:53 AM
 - Closed by:
- Journal Tab:** Shows 1 journal entry.
 - Category:** Customer Communication
 - Created by:** cpfau
 - On:** 12/8/2008 7:50 AM
 - Narrative:** This communication will be sent to the customer. We troubleshoot her network connection. She is connected to the network but she is not getting proper DHCP information - she has no gateway in her ipconfig. She will turn off all the wireless airports and then reboot her pc. Hopefully, it is her airports that are trying to hand out DHCP information and this will correct the issue. If this does not work, she has been instructed to call back.

The bottom of the interface shows a Windows taskbar with the Start button, the application name 'IT Service Management', and the system clock showing 11:44 AM on 12/8/2008.

Close Tab

- Click this tab to show all the information relating to closing of the incident.
- Service Name - Service catalog classification of the reported service affected. The first two levels are required, and all four levels are constrained.
- Config Item - Configuration item that relates to the incident. This item is optional but if used the first two levels are constrained.
- Detail Screen - yes/no for the Service Desk or Operations to select if a Detail Screen of data is needed.
- If this is a Lead incident then information will be displayed explaining that any information entered will be sent to all the Linked incidents.
- Closed information sent to customer - where you enter the solution or workaround for the customer.
- Underlying Cause - what/who caused the problem.
- Why was the SLO missed - required selection if you are closing the incident after the SLO date/time has past.
- Override Created Date/Time - ability to override when the incident was created.
- Override Closed Date/Time - ability to override the closed date/time.

IT Service Management - Incident: 141032

File Edit View Incident QuickActions Searching Reports E-mail Tools Help

Incident Incident 23 of 194

Workspace

FrontRange IT Service Management Connection : ITSM Welcome Admin

Incident

Navigator

Global

Home

QuickAction Center

Search Center

Report Center

Dashboard Center

QuickActions

Create3282000Transfer

SendPasswordLink

SendSelfServiceEmail

SendVerificationLink

Searches

Search: Notification Subject

Reports

Dashboards

Incident

Incident

Go To Incident...

Find Incident...

Incident Quick Close

Link Incident to a Problem...

Link Incident to a Change...

Incident: 141032 Priority: 3 SLO: 12/8/2008 5:00 PM Status: Active

First Last Name: Becky Whitted

Name: Becky Whitted

Department: Sawyer Public School

Division:

Location:

City/State: Sawyer, ND

Phone: (701) 624-5167 Ext:

Email: becky.whitted@sendit.nodak.edu

Incident as reported by customer

Sawyer Public School has no Internet connectivity this morning. I conference Colleen with Becky.

Urgency: Medium Impact: Medium Source: Phone Type: Incident

Created by: dwalz On: 12/8/2008 7:38 AM

Last Mod by: cpfau On: 12/8/2008 7:53 AM

Closed by:

On:

Assignments: 2 Journals: 1 Close Close Pending Details: 0 Attachments: 0 # of Linked Incidents: 0 Audit Records: 1 Additional Email Address:

Service Name: IT Infrastructure Services Config Item: (None)

Network: (None)

(None)

(None)

Detail Screen?: (None)

Closed information sent to customer

Underlying Cause: (None)

Why was the SLO missed?: (None)

Override Created DateTime: 12/8/2008 7:38 AM

Override Closed DateTime: / / :

Start IT Service Management - ... Desktop 11:45 AM

Close Pending Tab

- Click this tab to 'Resolve' or 'Change back to Active' the incident.
- The buttons on the tab are controlled by the Status of the incident. In order to 'Resolve' an incident it must have a current status of 'Active'. In order to 'Change back to Active' an incident it must have a current status of 'Resolved'.
- You must enter information before clicking on the button to do the process.
- If you are 'Resolving' the incident then the information you enter will be automatically inserted into the Close Description.
- An email will be sent to the customer with the information you enter.
- No there is no limit to the number of times you can 'Resolve' or 'Change back to Active' and incident.

IT Service Management - Incident: 141032

File Edit View Incident QuickActions Searching Reports E-mail Tools Help

Incident 23 of 194

Workspace

FrontRange IT ServiceManagement Connection : ITSM Welcome Admin

Incident

Navigator

Global

Home

QuickAction Center

Search Center

Report Center

Dashboard Center

QuickActions

Create3282000Transfer

SendPasswordLink

SendSelfServiceEmail

SendVerificationLink

Searches

Search: Notification Subject

Reports

Dashboards

Incident

Incident

Go To Incident...

Find Incident...

Incident Quick Close

Link Incident to a Problem...

Link Incident to a Change...

Incident: 141032 Priority: 3 SLA: 12/8/2008 5:00 PM Status: Active

First Last Name: Becky Whitted

Department: Sawyer Public School

Division:

Location:

City/State: Sawyer, ND

Phone: (701) 624-5167 Ext:

Email: becky.whitted@sendit.nodak.edu

Urgency: Medium Impact: Medium Source: Phone Type: Incident

Created by: dwalt On: 12/8/2008 7:38 AM

Last Mod by: cpfau On: 12/8/2008 7:53 AM

Closed by:

On:

Assignments: 2 Journals: 1 Close Close Pending Details: 0 Attachments: 0 # of Linked Incidents: 0 Audit Records: 1 Additional Email Address

The information entered will be sent to the customer notifying them if we do not hear back within 5 days that we will assume the resolution fixed their problem and we will close their incident. However, direct contact with the customer is typically preferred. For history, this information will be transferred into the journals.

Information sent to customer (required)

Change status to Resolved

Start IT Service Management - ... Desktop 11:45 AM

Details Tab

- Click this tab to show Detail information on particular problems.
- There are three types of Detail screens:
 - Web Apps Security - used when a customer has problems logging into a state agency web site that has the code to request assistance from the Enterprise Service Desk.
 - Contact Us - used when a customer clicks on the Contact Us link on the state portal.
 - Batch - used by ITD Operations when a mainframe job abends.
- # = 0 then no details, # = 1 then detail screen exists

IT Service Management - Incident: 141104

File Edit View Incident QuickActions Searching Reports E-mail Tools Help

Incident Incident 4 of 194

Workspace

FrontRange IT Service Management Connection : ITSM Welcome Admin

Incident

Navigator

Global

Home

QuickAction Center

Search Center

Report Center

Dashboard Center

QuickActions

Create3282000Transfer

SendPasswordLink

SendSelfServiceEmail

SendVerificationLink

Searches

Search: Notification.Subject

Reports

Dashboards

Incident

Incident

Go To Incident...

Find Incident...

Incident Quick Close

Link Incident to a Problem...

Link Incident to a Change...

Incident: 141104 Priority: 4 SLO: 12/11/2008 9:54 AM Status: Logged

First Last Name: Web Security

Name: Web Security

Department: Information Technology Dept.

Division: Customer Services

Location:

City/State: Bismarck, ND

Phone: (701) 999-4470 Ext:

Email: servicedesk@nd.gov

Incident as reported by customer

I need the answer to question # 2 I thought I put Minot High School

Category: Internet

CallType: Web Apps - Security

Assignee: Support Center

CustID: 999-4470

Urgency: Medium

Impact: Low

Source: AutoTicket

Type: Incident

Created by: Admin On: 12/8/2008 9:53 AM

Last Mod by: Admin On: 12/8/2008 9:53 AM

Closed by: On:

Assignments: 0 Journals: 0 Close Close Pending Details: 1 Attachments: 0 # of Linked Incidents: 0 Audit Records: 1 Additional Email Address:

Web Apps Security

Name: zona nelson

Email address: din46@rt.com

Application:

Login ID: zmn

URL: https://secure.apps.state.nd.us/jsnd/ui/claims/main.htm

Telephone:

Extension: Web_5

Forwarding agency: (None)

Response letter: (None)

Add. Comments:

Start IT Service Management - ... Desktop 11:47 AM

Attachments Tab

- Click this tab to show you all of the attachments for this incident.
- # = number of attachments
- The grid view allows you to view any of the attachments.
- Clicking New Attachment will allow you to add any type of file to this incident.
- If you are attaching sensitive data files be aware that viewing of an incident is controlled by the agency of the team(s) assigned to the incident.

The screenshot displays the FrontRange IT Service Management interface for Incident 140846. The interface includes a top menu bar with options like File, Edit, View, Incident, QuickActions, Searching, Reports, E-mail, Tools, and Help. A toolbar below the menu contains various icons for incident management. The main workspace is divided into a left sidebar with a Navigator (Global, Home, QuickAction Center, Search Center, Report Center, Dashboard Center) and a central area for the incident details.

Incident: 140846 Priority: 5 SLO: 12/12/2008 12:48 PM Status: Active

First Last Name: Tony Aukland

Incident as reported by customer: My laptop is locking up an average of 4 times a day, where I actually need to manually power it off and reboot. I have tried waiting it out but after 10 or 15 minutes, I assume I have waited long enough. It is blue screening which I have attached. Also, after I receive my login screen and enter my credentials, it takes 5 minutes to get to the desktop. I would like a new / re-imaged hard drive for my laptop. I bought an

Urgency: Low **Impact:** Low **Source:** Internet **Type:** Incident

Created by: Admin **On:** 12/5/2008 12:47 PM
Last Mod by: gpgolberg **On:** 12/5/2008 2:09 PM
Closed by: On:

Name: Tony Aukland
Department: Information Technology Dept.
Division: Computer Systems
Location: Capitol
City/State: Bismarck, ND
Phone: (701) 328-3245 **Ext:**
Email: aukland@nd.gov

Attachments: 2

Name	Created On
IMG000058.jpg	12/5/2008 12:47 PM
IMG0000581.jpg	12/5/2008 12:47 PM

The bottom of the interface shows a Windows taskbar with the Start button, the application name "IT Service Management - ...", and the system clock showing "11:48 AM".

of Linked Incidents Tab

- click this tab to show all the linked incidents.
- # = count of linked incidents.

IT Service Management - Incident: 127280

File Edit View Incident QuickActions Searching Reports E-mail Tools Help

Workspace

FrontRange IT Service Management Connection : ITSM Welcome Admin

Incident

Navigator

- Global
- Home
- QuickAction Center
- Search Center
- Report Center
- Dashboard Center

QuickActions

- Create3282000Transfer
- SendPasswordLink
- SendSelfServiceEmail
- SendVerificationLink

Searches

Search: Notification.Subject

Reports

Dashboards

Incident

- Incident
- Go To Incident...
- Find Incident...
- Incident Quick Close
- Link Incident to a Problem...
- Link Incident to a Change...

Incident: 127280 Priority: 3 SLO: 9/25/2008 1:19 PM Status: Active

First Last Name: Terri Tober

Name: Terri Tober

Department: Job Service ND

Division:

Location:

City/State: Bismarck, ND

Phone: (701) 328-1684

Email: ttober@nd.gov

Ext:

Incident as reported by customer

Tracy Helfenstein and Duane Isaacson have lost the capability to relaunch work items in FileNet-BPM. Please research why this has happened. Contact Tracy--1964 and Duane--3352. I thought Colette Clooten and Terri Tober also have this capability. Thanks.

Urgency: Medium

Impact: Medium

Source: Internet

Type: Incident

Created by: Admin On: 9/24/2008 1:18 PM

Last Mod by: sfoelich On: 12/8/2008 9:53 AM

Closed by:

On:

Assignments: 4 Journals: 7 Close Close Pending Details: 0 Attachments: 0 # of Linked Incidents: 1 Audit Records: 3 Additional Email Address:

IncId	Name	Symptom	Status	Created Date Time
127065	Tracy Helfenstein	Tracy Helfenstein and Duane Isaacson	Active	9/23/2008 1:32 PM

Start IT Service Management - ... Desktop 11:49 AM

Additional Email Address Tab

- Click this tab to show the 3 types of CC email address's fields for this incident.
- Email Address(s) - allows anyone working on this incident to add additional contact email address's.
- Linked Email Address(s) - only show when the incident is a Lead Call. The email address(s) shown are all the customer(s) of the linked incidents. This data is read only and used for sending emails to all linked incidents when the Lead Call customer is emailed.
- Additional Customer Email Address(s) - is read only and contains additional email address's as assigned in the profile record.

IT Service Management - Incident: 127280

File Edit View Incident QuickActions Searching Reports E-mail Tools Help

Incident 1 of 1

Workspace

FrontRange IT Service Management Connection : ITSM Welcome Admin

Incident

Navigator

Global

Home

QuickAction Center

Search Center

Report Center

Dashboard Center

QuickActions

Create3282000Transfer

SendPasswordLink

SendSelfServiceEmail

SendVerificationLink

Searches

Search: Notification, Subject

Reports

Dashboards

Incident

Incident

Go To Incident...

Find Incident...

Incident Quick Close

Link Incident to a Problem...

Link Incident to a Change...

Incident: 127280 Priority: 3 SLO: 9/25/2008 1:19 PM Lead Call Status: Active

First Last Name: Terri Tober

Name: Terri Tober

Department: Job Service ND

Division:

Location:

City/State: Bismarck, ND

Phone: (701) 328-1684

Ext:

Email: ttober@nd.gov

Incident as reported by customer

Tracy Helfenstein and Duane Isaacson have lost the capability to relaunch work items in FileNet-SPM. Please research why this has happened. Contact Tracy--1964 and Duane--3352. I thought Colette Clouten and Terri Tober also have this capability. Thanks.

Urgency: Medium

Impact: Medium

Source: Internet

Type: Incident

Created by: Admin On: 9/24/2008 1:18 PM

Last Mod by: sfroelich On: 12/8/2008 9:53 AM

Closed by: On:

Assignments: 4 Journals: 7 Close Close Pending Details: 0 Attachments: 0 # of Linked Incidents: 1 Audit Records: 3 Additional Email Address

Any email address(s) shown below will be included in all emails going to the customer. When you have more than one email address please separate the two with a semi colon and a space.

Email Address(s)

Linked Email Address(s)

thelfenstein@nd.gov

Start IT Service Management ... Desktop 11:50 AM

IT Service Management - Incident: 141114

File Edit View Incident QuickActions Searching Reports E-mail Tools Help

Workspace

FrontRange IT Service Management Connection : ITSM Welcome Admin

Incident

Incident

Incident: 141114 Priority: SLO: 1/1/0001 12:00 AM Status: Logged

First Last Name: Gerald Olson Name: Gerald Olson

Incident as reported by customer

Department: Information Technology Dept.
Division: Customer Services
Location: Northbrook
City/State: Bismarck, ND
Phone: (701) 328-2922 Ext:
Email: golson@nd.gov

Urgency: Impact: Source: Phone Type: Incident

Created by: golson On: 12/14/2008 11:53 AM
Last Mod by: golson On: 12/14/2008 11:53 AM
Closed by: On:

Assignments: 0 Journals: 0 Close Close Pending Details: 0 Attachments: 0 # of Linked Incidents: 0 Audit Records: 0 Additional Email Address

Any email address(s) shown below will be included in all emails going to the customer. When you have more than one email address please separate the two with a semi colon and a space.

Email Address(s)
anycustomer@myplace.com

Additional Customer Email Address(s)
gkolson1@bis.midco.net

Start IT Service Management - ... Desktop 11:53 AM



Appendix A - Quick Reference

Upon notification of an incident:

- Start ITSM using the icon on your desktop
- Log into ITSM using your ndgov userid and password
- Click Find, Click Go to record, enter the incident # and click ok
- Review the 'Incident as reported by customer' field
- Click on the assignment tab
 - If the last assignment is to your team and you are going to work the incident, then:
 - Click on that assignment row
 - Click on the edit Pencil
 - Click on the Accept button
 - Click on the Complete button
 - Click on the Save button
 - Click on New Internal Assignment
 - Select your team from the Team drop down list
 - Select yourself from the Assignee drop down list
 - Click on the Accept button
 - Click on the Save button
 - Click on the Incident Save icon (diskette) at the top of the window
 - If the last assignment is to your team and you are going to reassign it to another person on your team, then:
 - Click on that assignment row
 - Click on the edit Pencil
 - Click on the Accept button
 - Click on the Complete button
 - Click on the Save button
 - Click on New Internal Assignment
 - Select your team from the Team drop down list
 - Select the person you are assigning this to from the Assignee drop down list
 - Click on the Save button
 - Click on the Incident Save icon (diskette) at the top of the window
 - If the last assignment is to your team and you are going to reassign it to another team, then:
 - Click on that assignment row
 - Click on the edit Pencil
 - Click on the Accept button
 - Click on the Complete button
 - Click on the Save button
 - Click on New Internal Assignment
 - Select the team from the Team drop down list
 - Click on the Save button
 - Click on the Incident Save icon (diskette) at the top of the window
 - If the last assignment is to you and you are going to work the incident, then:
 - Click on that assignment row
 - Click on the edit Pencil
 - Click on the Accept button
 - Click on the Save button
 - Click on the Incident Save icon (diskette) at the top of the window



While you are working on an incident:

- To create a journal record that will send an email to the customer
 - Go to the incident
 - Click on the Journals tab
 - On the Category field drop down, select 'Customer Communication'
 - Enter into the Narrative field the information you want sent to the customer, make sure you spell check your typing.
 - Click the Save icon (diskette) at the top of the window
- To create a journal to record what you have done on the incident, this will not be sent to the customer
 - Go to the incident
 - Click on the Journals tab
 - On the Category field drop down, select 'Internal Communication'
 - Enter into the Narrative field the information you want sent to the customer, make sure you spell check your typing.
 - Click the Save icon (diskette) at the top of the window
- To 'Resolve' the incident
 - Go to the incident
 - Click on the Close Pending tab
 - Enter a descriptive resolution for the customer
 - Click the 'Change status to Resolved' button
 - Click the Save icon (diskette) at the top of the window
 - **Note:** the resolution you entered will be copied to the 'Closed information sent to customer' field on the Close tab.
 - **Note:** the status of the incident must be 'Active' before you can 'Resolve' an incident.
- To 'Unresolve' or 'Change back to Active' the incident
 - Go to the incident
 - Click on the Close Pending tab
 - Enter a descriptive information for the customer
 - Click the 'Change status back to Active' button
 - Click the Save icon (diskette) at the top of the window
 - **Note:** the 'Closed information sent to customer' field on the Close tab will be blanked out.
 - **Note:** the status of the incident must be 'Resolved' before you can 'Unresolve' an incident.
- To add an attachment to the incident
 - Go to the incident
 - Click on the Attachments tab
 - Click on New Attachment
 - Select the file
 - Click Open
- To view an attachment on a incident
 - Go to the incident
 - Click on the Attachments tab
 - Double click on the row with the attachment you want to see
- To add an additional email address to the incident
 - Go to the incident
 - Click on the Additional Email Address tab



- If there is already an email address in 'Email Address(s)' then you need to first add a `; ` after the last email address before entering the email address you want. If none, then just enter the email address you want.
- To view the linked incidents
 - Go to the incident
 - Click on the # of Linked Incidents tab
 - Click on a row
 - Click on the green icon with an arrow, this will bring up a separate window with the linked incident. Closing this window will take you back to the Lead incident.
 - Linking and unlinking of incidents needs to be done by the Enterprise Service Desk only.
- To close the incident
 - Go to the incident
 - Click on the assignment tab
 - Click on the assignment row of your assignment
 - Click the edit pencil
 - Click the complete button
 - Click the save button
 - Click the close tab
 - Change the Service Name and/or Config Item if needed
 - Enter a descriptive resolution to the customer
 - Select an underlying cause
 - If the current date time is beyond the SLO date time then you need to select a 'Why was the SLO missed?'
 - If you need to override when the incident was created or closed, do so.
 - Click the incident save icon
 - Click the quick close icon (red with x)
 - Click the incident save icon



Appendix B - Priority Matrix

Incidents reported to the Enterprise Service Desk will follow a Priority Matrix. The Enterprise Service Desk will work with customers to identify the **Impact** that an incident has on their core business and the **Urgency** desired for its resolution. All incidents will be assessed a priority based upon the following matrix.

- **Urgency** is an assessment of the speed with which an Incident needs resolution.
 - **Impact** reflects the likely effect the Incident will have upon core business services.
- Together, **Urgency** and **Impact** are blended to assign the **Priority** of an incident.

		IMPACT		
		HIGH Cannot conduct core business	MEDIUM Restricts ability to conduct business	LOW Does not significantly impede business
URGENCY	HIGH Requires immediate attention	1	2	3
	MEDIUM Requires resolution in near future	2	3	4
	LOW Does not require significant urgency	3	4	5

Appendix C - Service Level Objectives

All incidents are assigned a priority based upon their impact and urgency. (See the above Priority Matrix). That priority is used to drive the Enterprise Service Desk's commitment to customers. Our **Service Level Objectives** for Incident Management will be:

Type	Effort until Resolved/Contained	Final Resolution
Quick Fix	First Call Resolution, 24/7	15 minutes
Major Incident	Requires immediate attention, 24/7	2 hours
Priority 1	Requires immediate attention, 24/7	2 hours
Priority 2	Requires immediate attention, 24/7	4 hours
Priority 3	Business hours	9 hours (1 day)
Priority 4	Business hours	27 hours (3 days)
Priority 5	Business hours	45 hours (1 week)

("Business hours" are 8am-5pm, Monday through Friday; excluding state holidays.)

Managing customer expectations is the key! Therefore, if a Service Level Objective cannot be met, then communication with the customer is essential for achieving their overall satisfaction.

There is a significant difference between [Resolution and Closure](#). There may also be [Differences in Time](#) between the initial resolution, the final resolution, and the incident life-cycle.

Target

Incident resolution is not an exact science. Therefore, the Enterprise Service Desk goal is that 90% of incidents will meet their Service Level Objectives.

Regardless, the Enterprise Service Desk is committed to managing customer expectations. If a Service Level Objective cannot be met, the Enterprise Service Desk will work with customer to report the status of the incident and to reassess their expectation for resolution.

ITD's ability to set, manage, and deliver on customer expectations is critical to our "customer-centric" spirit!

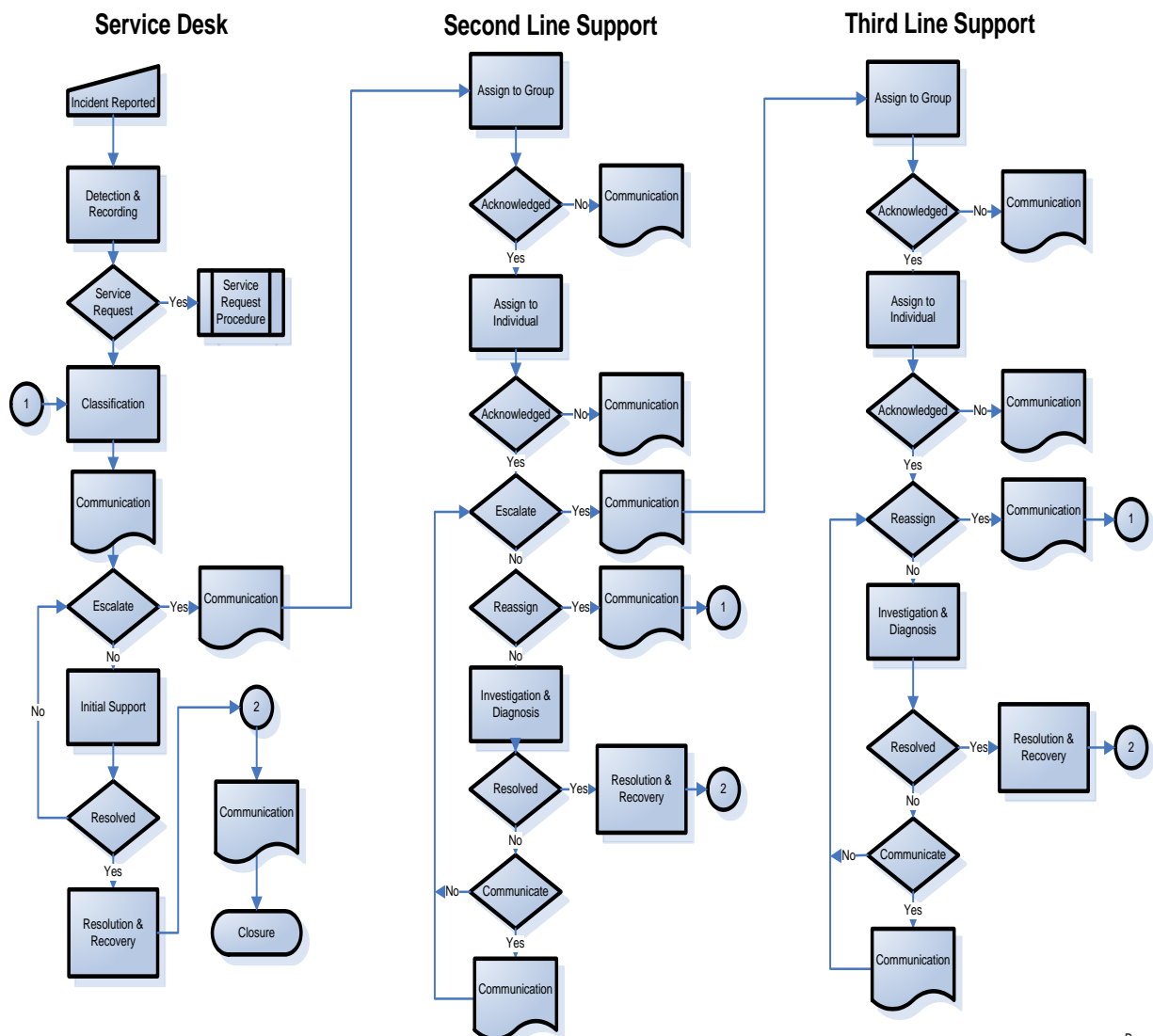
Appendix D - Incident Management Process Flowchart

- About Incident Management
 - Incident Management identifies events causing service interruptions or reduction in the quality of service. The goal of Incident Management is to restore normal service quickly and reduce the impact on the business operations.
- Working with Incidents
 - Incident Workflow



Information Technology Department

Incident Management Process





Appendix E – What's New in ITSM v6.x

- Dashboard / Grid
 - Back button in dashboard parts drill down; when a user drills down from a dashboard part, they can use the back button defined in the dashboard part to go back to the parent level.
 - Picking grid columns with persistent changes; users can pick the columns they want to see. They can also hide the columns defined in the grid.
- Field Options
 - A red asterisk will be to the right of a field if they are mandatory.
- General
 - Click-Once installer; auto-deploy installer has been updated to Click-Once. With click-once the start up time is much faster.
 - Hot key for home screen; users can now access their home screen using a hot key.
 - Microsoft Standard context menu; supports the right-click standard menu in the controls. The supported items are: Cut, Copy, Paste, and Select all.
 - Spellchecker is enabled; right click in any text field.
 - Dropdown data fields will start to fill as you enter data.
- System Requirements
 - Support for Microsoft Vista is added.
 - Firefox is supported; using the Firefox Browser 2.0.0.4 or above.

Appendix F - Outgoing email messages

Acknowledgement to Customer -

After the incident has been entered, the system will auto generate an email back to the customer showing their incident number, date/time received, SLO date/time and description as entered by the Analyst.

Send	From...	
	To...	Miller, Thomas R.;
	Cc...	
	Bcc...	
	Subject:	Service Desk incident acknowledgement

Hello Thomas Miller,

The following incident #100010 was created for you on 4/8/2008 9:45 AM.

Based upon the initial assessment, the incident has a Medium sense of urgency and a Medium impact on your core business. Therefore, it is considered a priority 3. We will devote resources during regular business hours and our goal is to have the incident resolved/contained by 4/9/2008 9:46 AM. If we are unable to achieve that goal, a technician will contact you to report the status of the incident and to reassess your expectation for resolution.

Incident as reported by customer:
He tried to logon to the computer and gets a message that the current time and the current time on the network is different. To logon contact your administrator. Had the user undock and redock and restart the laptop. User receives the same message. The account is not locked either. The tag number is 12567.

Should you have any questions or feel this incident has been recorded incorrectly, please contact the Service Desk.

We hold ourselves accountable for a positive customer experience, our goal is that you will be "Very Satisfied" with the service and support you received. At the close of this incident you will have the opportunity to let us know how we are doing by completing a brief survey.

For your convenience a simple method to quickly log incidents can be found at:
<http://www.nd.gov/itd/support/selfservice/createincident.aspx>

Thank you,

Service Desk
Customer Services Division
Information Technology Department
State of North Dakota

(701)328-4470/(877)328-4470
servicedesk@nd.gov

Assignment to a team -

Email sent when an assignment is created to a group.

Send	From...	
	To...	[-Grp-ITD Distributed Systems]
	Cc...	
	Bcc...	
	Subject:	New Incident # 100008 assigned to your team

Please review the information below to determine if you are the team member that should log into ITSM and acknowledge this incident.

Customer Name: Sharon Gross
Customer Phone: 7013289600
Received Date/Time: 4/8/2008 9:38 AM
Department: Insurance Commissioner, Office of the
Division:
Urgency: Medium
Impact: Medium
Priority: 3
Incident as reported by customer:
Doing some scanning, when in verifier, it has been sitting as batch Q'd for over an hour now. Batch 00113162.

15 minute unacknowledgement to a Team -

When an assignment to a Team goes unacknowledged for more than 15 minutes this email is sent to that Team asking someone to look into it.

Send	From...	
	To...	tdheathdhssodt@nd.gov
	Cc...	
	Bcc...	
Subject:		Unacknowledged incident in ITSM, it has been over 15 minutes since it was assigned to your team.
<p>Please review the information below to determine if you are the group member that should log into ITSM and acknowledge this incident, if you are unsure please check into this.</p> <p>Incident #: 100006 Customer Name: Brendan Joyce Customer Phone: 7013284023 Created Date/Time: 4/8/2008 9:27 AM Department: Human Services, Dept. of Division: Impact: Medium Urgency: Low Priority: 4 Service Name: Line-of-Business Services Other Incident as reported by Customer: The last 4 days the first time he launches the application it takes 5 minutes to go. The screen then pops up for the mainframe finally.</p>		


60 minute unacknowledgement to a Team -

When an assignment to a Team goes unacknowledged for more than 60 minutes this email is sent to that Team, their division director, their supervisor and the Service Desk asking someone to look into it.

Send	From...	
	To...	-Grp-ITD Team Kool Kats; Goroski, Steve R.
	Cc...	
	Bcc...	
Subject:		Unacknowledged incident in ITSM, it has been over 1 hour since it was assigned to your team.
<p>Please review the information below to determine if you are the group member that should log into ITSM and acknowledge this incident, if you are unsure please check into this.</p> <p>Incident #: 100011 Customer Name: Tanya Taplin Customer Phone: 7013285587 Created Date/Time: 4/8/2008 9:49 AM Department: Highway Patrol Division: Impact: Medium Urgency: Medium Priority: 3 Service Name: IT Infrastructure Services Hosting Incident as reported by Customer: Are there issues with Central Supply in the mainframe? On order - supplies a user is getting an error "0780nat3048 error during open processing." Screen number is cs1060. This is in: Central Supply - Order Inquire</p>		



60 minute unacknowledgement to an Individual –

When an assignment to an Individual goes unacknowledged for more than 60 minutes this email is sent to that person, the Service Desk and the person who made the assignment.

	From...	
	To...	Birnbaum, Terese M.;
	Cc...	
	Bcc...	
Subject: Unacknowledged incident in ITSM, it has been over 1 hour since it was assigned to a member.		
<p>The incident assigned to Gerald Olson is still unacknowledged after 1 hour. Please help ensure the incident is acknowledged and that the assignee has the time/resources to respond.</p> <p>Incident #: 100040 Customer Name: Gerald Olson Customer Phone: 7013282922 Created Date/Time: 4/14/2008 8:30 PM Department: Information Technology Dept. Division: Customer Services Impact: Low Urgency: Low Priority: 5 Service Name: Communication, Collaboration, and Desktop Services Email / Calendaring Incident as reported by Customer: Testing Lead Call</p>		

Team Acknowledgement -

Team assignment is accepted by a member.

	From...	
	To...	 <u>-Grp-ITD Team Farside</u>
	Cc...	
	Bcc...	
Subject: Incident # 100035 has been accepted by Shelly Sheetz		
<p>This notification is sent to you as a courtesy to show that Shelly Sheetz has accepted an assignment on incident # 100035.</p>		

New journal record created -

When a journal record has been created with the category type of 'Customer Communication', the following email message will be sent. Note: Journal Notes with category of 'Internal Communication' will not be sent to anyone.

This message has not been sent.

From...	
To...	jferdere@nd.gov
Cc...	
Bcc...	
Subject:	Service Desk Notification on Incident # 100022

Send

Hello Jacqui ~~Ferdere,~~

The incident you reported on 4/8/2008 10:52 AM to the Service Desk has been updated.

Incident as reported by customer:
She paid a bill in financial and came up with an error. She said it is ~~unposted~~ and she is not getting a check from it. The voucher number is 1329.

Narrative:
This is a test.

Should you have any questions regarding this update, please contact the Service Desk.

We hold ourselves accountable for a positive customer experience, our goal is that you will be "Very Satisfied" with the service and support you received. At the close of this incident you will have the opportunity to let us know how we are doing by completing a brief survey.

Thank you,

Service Desk
Customer Services Division
Information Technology Department
State of North Dakota

(701)328-4470/(877)328-4470
servicedesk@nd.gov

Incident closed email to customer -

When an incident is closed an email is sent to the customer with the closed description along with a link to take a short survey.

From...	
To...	Kennedy, Mark A.;
Cc...	
Bcc...	
Subject:	An incident reported to the Service Desk has been closed

Send

Hello Mark Kennedy,

The incident you reported on 4/9/2008 8:38 AM to the Service Desk has been closed.

Incident as reported by customer:
SB63189 ABENDED IN STEP STEP2 WITH AN ERROR CODE OF SB37.

Resolution sent to customer:
test

Should you require additional follow up on this incident, or feel the incident has not been resolved to your satisfaction, please contact the Service Desk.

We hold ourselves as accountable for a positive customer experience. Let us know how we are doing! Without your feedback, we can only assume that you were "Very Satisfied" with our service and support you received. So "Please" take a moment to complete a brief survey at:
<http://itdnet3test.itd.nd.gov/itd/cssurvey/cssurvey.aspx?id=19595bfe4b15b7c76b94bad5333da361>

Thank you,

Service Desk
Customer Services Division
Information Technology Department
State of North Dakota

(701)328-4470/(877)328-4470
servicedesk@nd.gov